University of Durham
Centre for Middle Eastern and Islamic Studies

Manufacturing and women in the Middle East and North Africa: a case study of the textiles and garments industry

by

V.M. Moghadam
World Institute for Development Economics Research
United Nations University
Finland

CMEIS Occasional Paper No. 49
June 1995

CMEIS Occasional Papers
ISSN 1357-7522
No. 49

CMEIS Occasional Papers
are published by the

Centre for Middle Eastern and Islamic Studies
University of Durham
South End House
South Road
Durham DH1 3TG
United Kingdom
Tel: 0191-374 2822
Fax: 0191-374 2830
Tel: (Editorial office direct line) 0191-374 7983

Price: £ 5.00. To order, send your request with a cheque made payable to the University of Durham to the above address. Please add 50p for postage UK inland and £ 1.00 for postage overseas.

The Occasional Papers series covers all aspects of the economy, politics, social science, history, literature and languages of the Middle East. Authors are invited to submit papers to the Editorial Board for consideration for publication (please mail to: Margaret Greenhalgh)

Contents

Acronyms

ASEAN	Association of South-East Asian Nations
CAPMAS	Central Agency for Public Mobilisation and Statistics
EFTA	European Free Trade Association
ELI	Export-led industrialization
EPZ	Export-processing zone
ISI	Import-substitution industrialization
MVA	Manufacturing value-added
NIC	Newly-industrializing country
SAP	Structural adjustment policy
STARS	World Bank data set which includes African development indicators, social indicators of development, world development indicators, world tables and world debt tables
TNC	Transnational corporation
UNIDO	United Nations Industrial and Development Organisation
WISTAT	United Nations Women's Indicators and Statistics

About the author

V.M. Moghadam is Senior Research Fellow at the World Institute for Development Economics Research of the United Nations University, Helsinki, Finland

Manufacturing and women in the Middle East and North Africa: a case study of the textiles and garments industry

The textiles and garments' industry is one of the world's oldest and also one of the most globalized. It is, moreover, a largely female industry. Economic historians have noted its importance to the economic development and expansion of Western countries and Japan, economists have emphasized the importance of this industry to countries' economies and export earnings, and women-in-development specialists have stressed the centrality of female labour to this industry (and to the electronics industry).[1]

In the 1960s and 1970s, the supply of cheap female labour was a major contributor to the growth of the East and South-East Asian industries. The industrial performance of the newly industrializing countries (NICs) and the continued reliance on female labour suggest an important mutual relationship between women's employment and overall development and industrial growth. For these reasons, scholars, activists, and policy-makers alike have devoted considerable attention to the role of women in manufacturing.[2]

Unlike other regions in the world economy, the Middle East and North Africa (MENA) suffers from a paucity of economic and sociological research on industrial and labour market issues in general, and women's industrial employment in particular. In usually comprehensive international data sets such as STARS, WISTAT, and the International Labour Organization (ILO) *Yearbook of International Labour Statistics*, data are missing on wages, hours of work, unemployment, strikes and lockouts, occupational injuries, etc., for countries of the region, and available data are not always gender-disaggregated. Information is lacking on women's trade union participation, and on their

1 On female labour in industrializing England and France, see Tilly and Scott (1978); on the signal importance of female labour in early twentieth century Japanese textiles, and the high rate of exploitation, see Goldfrank (1988); on the importance of the textiles industry and female labour to Korea and Taiwan, both before and after World War II, see Cumings (1988).

2 The literature is vast. For full references and an elaboration of the issues, see Moghadam (1993), chapter 2. See also my chapter, 'The Political Economy of Female Employment in the Arab Region', in Nabil Khoury and V.M. Moghadam, eds., *Gender and Development in the Arab Region: Patterns, Determinants, Policies* (forthcoming, Zed). It is worth mentioning here that Standing (1989) has proposed that the globalization of production and increasing flexibility of labour markets favours the 'feminization of employment' in the double sense that women's involvement in industrial occupations is increasing and the conditions of employment are deteriorating.

access to social security. Official statistics are problematical in many ways. For example, in Egypt, labour force data sets over different time frames are not strictly comparable because of definitional inconsistencies. A continuing problem is the undercounting of women's economic activity. In some countries, women's industrial involvement is disguised by subcontracting arrangements, by their engagement in unregistered workshops, and by homework - all of which escape the attention of enumerators.[1]

These measurement problems, however, pale before the discrimination women face in industrial employment - including limited access to salaried jobs, lower wages, and little room for advancement - which may emanate from a widespread view that factory work is inappropriate for women, and that men are more suitable or deserving than women for industrial jobs. Capital-intensive industrial branches and new technologies tend to favour male labour. Although in all countries of the region working-class women do work in factories - especially in textiles and garments and in food processing, as well as in pharmaceuticals and chemicals - their engagement is limited due to their disadvantaged position *vis-à-vis* male labour. Thus in the most industrialized Middle Eastern countries, Turkey and Egypt, women's overall share of manufacturing employment as measured by official statistics is quite small, while in the countries where their share is fairly large due to export-oriented policies, notably in Morocco and Tunisia, much of this employment is non-regular and without benefits.[2]

Limited nature of Middle Eastern women's industrial employment

The limited nature of Middle Eastern women's industrial employment has another cause, and that is the relatively limited depth and scope of industrialization in most of the region, including relatively little foreign direct investment in manufacturing.[3] The kinds of concentrations of female labour in transnational corporations (TNCs) or in export-processing zones (EPZs) that are characteristic of South-East Asian and some Latin American and Caribbean countries are rarely found in MENA countries, because of the past dominance of what Owens (1985) has called 'the regional oil economy'. While in Hong Kong, Japan, Malaysia, South Korea and Singapore where women constitute about 43 per cent of the manufacturing labour force and are a majority of the textiles and garments' branch (UNIDO, 1993a), the MENA region does not have such a high level of female participation in manufacturing. This is because the

1 The United Nations Economic and Social Commission for Western Asia (ESCWA) is seeking to improve statistics on the labour force and on women. See UN/ESCWA, 1993; UN/ESCWA, 1994a. A World Bank technical assistance project will help improve statistics on women in Iran. Of all the MENA countries, statistical methods and the scope of coverage are probably most developed in Turkey.

2 The extent of female non-regular employment is unclear and needs to be researched.

3 Except in the cases of Egypt and Turkey (Joffé, 1993, p. 133). Much greater amounts of external capital flows have come in the form of official development assistance (for the poorer states) and of public sector loans or publicly-guaranteed loans to the private sector. Foreign direct investment was in decline in the 1970s and did not rise in the 1980s (Joffé, 1993, p. 138). The services sector, especially tourism, has been attracting considerable amounts of foreign investment, especially in Egypt, Tunisia, and Morocco. The services sector is the major contributor to GDP in those countries, as well as in Turkey and Iran.

development paths in the two regions have been different: in East and South-East Asia development has been based on labour-intensive export-oriented industries which required cheap female labour in large numbers, whereas in the MENA region the development path has relied on the oil economy. In 1992, fully 78.2 per cent of the Middle East's merchandise exports consisted of mining products, while exports of manufactures accounted for only 17.5 per cent.

In world-system terms, although most countries in MENA are semi-peripheral, the region's function in the world economy has been largely as a producer and exporter of petroleum and an importer of armaments. This is in contrast to the more advanced semi-peripheral countries, which have become the new 'manufacturing enclaves' (Gardezi, 1991, p. 185), specializing in labour-intensive intermediate processing and production of such commodities as textiles, apparel, synthetics, toys, electrical equipment, semiconductors, and other electronic components. Industry has failed to make progress comparable with that achieved in India or Brazil, let alone in South Korea. Richards and Waterbury (1990) note that total manufacturing value-added (MVA) in the region is approximately equal to that of Brazil. This has implications for female proletarianization. Lower levels of industrialization or manufacturing for export mean less female proletarianization and activity in the productive sectors.

Work conditions and employment status of women workers

The oil-based and import-substitution industrialization (ISI) pattern of development has started to change in the MENA region, as many countries have implemented structural adjustment policies to counter balance-of-payments deficits or have changed their economic orientation from import substitution to export promotion in an effort to spur growth.[1] (For data on the structure of production and of merchandise exports of MENA countries, 1970 and 1990, see Tables 1, 2 and 3, pp. 15-18 and Figure 2, p.16.)

Turkey has a much more substantial manufacturing base than the other countries in the region, but Tunisia and Morocco have progressed rapidly. There, many small garments' enterprises have been established, usually undertaking subcontracting work for French companies. In 1983-88, the largest employment increases in Moroccan manufacturing were in the textiles and garments' industries. Although much more research needs to be done on subcontracting and homework in MENA countries, those with the most substantial exports of garments (Turkey, Tunisia, and Morocco) seem also to have developed the most extensive subcontracting arrangements using female homework or unpaid female labour in small enterprises. If MENA countries follow the path of the

[1] The policies are controversial and the subject of heated debates about their efficacy in the region. At the moment, MENA countries still suffer from stagnating GDP, high indebtedness, high inflation, high unemployment, declining public revenues, public expenditures, and overall investment. In particular, there are questions about the impact of conventional adjustment policies on employment and labour market processes. See Karshenas (1994) and Marzouq (1994).

South-East Asian NICs, then we should expect to see a steady growth of female labour in the expanding export-oriented textiles and clothing sectors, as well as in other traditionally female-intensive industrial sectors. What need to be monitored, however, are the work conditions and employment status of women workers.

This paper explores women's participation in the textiles and garments' industry in the MENA region, and surveys the large countries. Sources of data are statistical yearbooks and population censuses, various published works on the subject, and the author's fieldwork. The paper comes in five parts. Following this introduction, I discuss some of the main factors influencing female employment in general and in the Middle East in particular. Section two describes the structure of female employment and characteristics of the female labour force. Section three provides brief case studies of women's role in the manufacturing sector in general and in the textiles and garments' branch in particular, in Egypt, Morocco, Tunisia, Turkey, and Iran. The concluding section highlights implications for policy and research.

Section one:
Factors influencing female employment

Throughout the world, both the supply of and demand for female labour have been growing. Figure 1 provides a list of some relevant supply and demand factors. Three interrelated forces condition and structure the position of women in the labour market: (i) supply factors that influence whether the women are available for wage labour outside the household; (ii) the specific structure of the economy, which conditions the demand for workers in the labour market; (iii)

Figure 1 Factors in Female Labour Supply and Demand

Supply Factors (Includes Changes in Individual Attributes)	*Demand Factors (Availability of Opportunities)*
. demographic factors, including size of female population of working age; educated women; fewer children; divorced, single women; shortage of male labour (via warfare or migration); higher life expectancy	. evolution of new types of resource-generating work roles
. changing aspirations	. economic expansion
. improvements in home technology easing burden of domestic labour	. wartime economy
. inflation and housing costs	. industrial development
. economic need or poverty	. deskilling (of industrial work)
. household survival strategy	. technological change (e.g., computer revolution)
	. export manufacturing
	. "woman-friendly" social policies

the implicit and explicit policies regarding the inclusion/exclusion of women in the labour market as reflected in hiring practices, segregation of jobs by sex, earnings/wage structure, and so on.

These three forces imply class, cultural, technical, and institutional determinants, all of which operate in dynamic ways. For example, rising educational attainment of women and the shift from a goods-producing to a service economy may induce more women to work for pay because of higher wages. As birthrates decline at higher levels of development, female labour-force participation tends to increase; at the same time, fertility decline is associated with rising educational attainment and employment of women, as well as access to better healthcare and availability of contraception.

Many studies have emphasized supply-side factors in explanations of either the small number of women in the workforce or the expansion of job-seeking women in the MENA region; conservative cultural attitudes, lack of education and training, and early marriage and childbearing are frequently cited as reasons for the shortage of women workers. These are certainly real factors. A study of textile workers in a large factory in Cairo found that 'there was strong resistance to the idea of wives working. Less than 10% said they would let their wives work', even though the men complained that their wages were low and that they supplemented their income through a second job (Henley and Ereisha, 1987, p. 508). Pissarides (1992) emphasizes the growth in the supply of highly-educated women, whose preferred employment destination is usually public service. Hijab (1988) cites need and ability as two of the three relevant factors in female labour force participation (the third is opportunity). Certainly economic need, household survival strategies, and increased literacy and educational attainment of women are factors that explain the increase in the supply of women willing to take jobs in the manufacturing sector or seeking employment in public service.

However, it is probably true that the demand for female labour conditions the supply; supply factors are probably more responsive to demand than vice versa (Chafetz,1990, p. 123). For example, women choose to have fewer children when they are employed outside the home; an increase in the wages that women can potentially earn in employment increases the probability that they will enter the labour force. Government policies also play a role; for many women, entry into the workforce is facilitated by woman-friendly social policies such as government-subsidized child care, and their ability to remain in the labour force may depend upon the availability of maternity protection policies. Type of development strategy and economic policies are also important demand-side factors. In many developing countries, demand for female labour has increased with the expansion of industries such as textiles and garments, food processing, and electronics - industries where managers and owners prefer to hire women partly because they are cheaper but also because they are perceived to be more compliant than men.

Migration and the labour force

Many studies cite demographic changes and population shifts as critical factors in shaping the labour force. Labour migration is an important element of these changes, and has played a significant role in the MENA region. In the golden age of MENA's economic development - the 1970s - the regional oil economy divided into capital-poor, labour-surplus countries (Egypt, Jordan, Lebanon, Morocco, Syria, Tunisia, Turkey, Yemen) and capital-rich, labour-receiving countries (Algeria, Bahrain, Iran, Iraq, Kuwait, Libya, Oman, Qatar, Saudi Arabia and the United Arab Emirates).

In the early 1980s, the principal labour-importing countries were Iraq and Saudi Arabia (Feiler, 1991, p. 136). At one time, Kuwait's dependence on foreign workers was such that they constituted nearly 80 per cent of its labour force (Feiler, 1991, p. 144). Imported labour was clearly vital to the receiving countries, while the remittances of migrant workers were extremely important to the sending countries. On the whole, MENA labour migration, in its various dimensions, has been a largely male phenomenon, though not without implications for female labour. When MENA women migrate, it is usually part of family migration. The migration flows may be summarized as following:

- **Rural-urban migration.** This has taken the form of:

(a) temporary male migration to the cities, with the result that women's agricultural activity and household responsibilities increased, such as in Yemen (Hatem, 1983; Hammam, 1986), Egypt (Morsy, 1990), and Morocco (Montoliu, 1989);

(b) migration *en famille*, sometimes resulting in unstable or intermittent employment for the male household head, necessitating income-earning on the part of the wife. In Iran in the 1970s, it is likely (though unconfirmed) that the increase in female urban manufacturing workers may have been linked to these in-migrants. In Istanbul and Bursa, migrant women work as maids or are concentrated in the home production of industry products (Cinar, 1991). In Cairo, many rural women migrants have taken up piece-work sewing at home (see Watson, 1992). In Morocco, male out-migration may explain the higher rate of growth of rural female employment between 1971 and 1986 (Montoliu, 1989, p. 19).

- **Intra-regional migration.** As mentioned above, this has been largely male, especially in production, although Palestinian, Egyptian, and Jordanian women teachers, nurses, and other professionals were also involved. The remittances were substantial, especially for Egypt, Jordan, Lebanon, Yemen, and Morocco. In some cases this created employment possibilities for women. For example, in North Yemen many women had to assume financial responsibility for the household. At one time the largest single employer of women, apart from the government, was the Chinese textile factory in San'a, which hired only women. According

to one account, 'After a massive radio campaign launched by the Chinese to advertise job openings at the factory, six hundred women presented themselves at the factory gates and were employed. The overwhelming majority of these women were heads of households due to divorce, out-migration of males, or widowhood' (Hammam, 1986, pp. 171-2).

- **International migration**. This has been of three types:

(a) Turkish 'guestworkers' to Germany, other European Union (EU) countries and Middle Eastern countries

(b) North African - mainly Moroccan and Tunisian - migration to France and increasingly to Spain (Moroccans). (Iranian immigration has been largely political in nature and cannot be said to be motivated by the operations of the capitalist market.)

(c) Asian workers to the Gulf states.[1]

Demand for migrant labour by the Gulf states has shrunk since the late 1980s. When the high levels of intra-regional migration came to an end after the Gulf War and the expatriate workers returned to their countries - one million Egyptians and Yemenis, 300,000 Jordanians, 260,000 Lebanese - unemployment shot up and the public sector had to provide housing, schooling and other social services to the returnees. According to one analysis, 'the shock was to some extent buffeted by the repatriation of workers' savings - a one-shot event. The continuation of restrictive immigration policies will hurt economic growth in the region.' (Diwan and Squire, 1993, p. 13). Jobs had to be found for returning labour migrants, as well as for the growing pool of new entrants (population growth rates remain high in most MENA countries), and other unemployed.

This creates a problem for job-seeking women. Although unemployment rates are not reliable or consistent, it is clear that they are high in many MENA countries. According to one source, 1990 unemployment rates were 15 per cent in Egypt, Morocco, and Tunisia, 20 per cent in Syria, and as high as 25 per cent in Jordan, Algeria, Lebanon, and Yemen (Diwan and Squire, 1993, p. 11). In Jordan, male applicants seem to be preferred over female applicants as a result of a policy to promote male employment and a perception that women, unlike men, do not support family members.[2]

Development strategy and the labour force

Stage of development, industrial strategy, and the structure of the labour force are linked. Similarly, women's employment in the manufacturing sector is related to specific industrial patterns. Research has linked the rise in female employment in the 1980s to export-oriented economic policies, and many studies have been

[1] According to the Turkish trade union DISK, notwithstanding the importance of workers' remittances, there has been a drain of highly skilled Turkish labour to European countries. And, ironically, in Germany they are more likely than are Germans to be unemployed. See DISK-AR (1992), p. 75.

[2] Interview with personnel manager, Hikma Pharmaceuticals, Amman, 12 November 1994.

critical of the ways in which women's labour has been utilized.

Other studies are more positive. Frances Perkins (1992) explored the effects of outward-oriented economic policies on the economic position of women in Asia and found that women were better off in outward-oriented trade regimes than in closed economies in terms of level of female labour-force participation, trends in employment, and other indicators of economic and social welfare of women, such as ratios of female-to-male earnings and numbers of hours worked over the past 15 to 20 years. She found major differences in these indicators pertaining to women between the outward-oriented East and South-East Asian countries on the one hand, and the South Asian economies of India, Pakistan, Bangladesh and Nepal, on the other.

The success of the South-East Asian countries in making the transition to export-led industrialization (ELI) in the early 1960s contributed to their rapid economic growth, facilitated by the rapid expansion of world trade in the 1960s. By contrast, in MENA the rate of industrial expansion remained slow until the mid-1950s. The industrialization drive gained momentum when revolutionary regimes took over in Egypt, Iraq, and Syria, and decided to divert oil revenues to finance industrialization through ISI.

The countries rich in oil and poor in other resources chose an industrial strategy based on the transformation of hydrocarbon resources into petroleum products and petrochemicals - a capital-intensive strategy involving an industrial sector that is traditionally male. The industrialization of other countries followed a typical pattern of ISI, although Algeria, Iraq, and Iran remained dependent on oil revenues for foreign exchange.

ISI in the MENA region, unlike that in Latin America, did not evolve into manufacturing for export. Because of oil revenues, governments chose to extend the import-substitution process, moving into capital-intensive sectors involving sophisticated technology (Mabro, 1988). Investment in iron and steel plants, petrochemicals, car assembly plants and similar industries, mainly for the home market, turned out not only to be costly and inefficient, but was also not especially conducive to increased female employment. Furthermore, the fluctuation and fall in the price of oil in the 1980s resulted in a decline in manufacturing activity in some countries.

The non-oil economies, on the other hand, have pursued development strategies of export-oriented manufacturing and agriculture. For example, although Tunisia exports oil, the latter's share of exports is lower than in OPEC countries (42 per cent in 1985 compared with Saudi Arabia's 97 per cent). In general, it is in the non-oil industrializing economies, especially Morocco and Tunisia, where significant numbers of women are engaged in manufacuring employment.[1]

[1] This point is also made in an ESCWA paper. 'Women and Development in the Arab World', by Hedi Jemai, prepared for the Arab Population Conference, Amman, April 1993.

Privatization, export manufacturing, and the labour force

Structural adjustment policies (SAPs) under World Bank and IMF auspices have been adopted by a number of countries (such as Turkey in 1980, Morocco in 1983, Tunisia in 1986 and Egypt in 1990), which have initiated privatization of state-owned enterprises and liberalization of prices and trade, as well as efforts to reduce the power of trade unions and to tie wage increases to improvements in productivity. For example, in Tunisia, privatization began in earnest in 1986, and by 1993, 30 out of a total of 200 state-owned enterprises had been privatized. The Turkish government announced plans to sell its enterprises in 1987. Economic reforms have resulted in the rescheduling or cancellation of debt payments (for example in Egypt) and in an increase in foreign direct investment (such as in Morocco and Tunisia). In Morocco, foreign investment averaged $160 million in 1989-90, rose to $320 million in 1991 and to over $500 million in 1992. In Tunisia, foreign direct investment was $75 million in 1989-90, $145 million in 1991, and $215 million in 1992 (Diwan and Squire, 1993, p. 30).[1]

This new development path and the promotion of exports should theoretically expand the manufacturing sector and the manufacturing labour force. In regional terms, the relative contribution of manufacturing industries to GDP in 1990 was about 21 per cent in Central and Eastern Europe and the European Free Trade Association (EFTA) countries, 29 per cent in Japan, 22.3 per cent in Latin America, and 23.5 per cent in member countries of the Association of South-East Asian Nations (ASEAN). In North Africa and west Asia, manufacturing's average contribution to GDP was 14.8 per cent and 14.3 per cent, respectively (UNCTAD, 1992, Table 6.3).

Among MENA countries, those with the largest relative contribution to GDP by manufacturing industries in 1990 were: Turkey (26 per cent); Morocco and Egypt (18 per cent); Algeria (16 per cent); and Tunisia (15 per cent, up from 8 per cent in 1970). (See Table 1 and Figure 1.) All these countries, except Algeria, are relatively significant exporters of textiles and garments, but in 1990 a somewhat larger percentage of their exports was still in petroleum (Egypt and Tunisia), and fertilizers (Morocco). (See Table 3.) As can be seen in Table 4, the top 15 world exporters of textiles do not include any MENA countries, although Turkey is among the top 15 world exporters of garments. As a percentage of merchandise exports in 1991, textiles and clothing together accounted for 27 per cent in Egypt, 20 per cent in Morocco, 33 per cent in Tunisia, and 36 per cent in Turkey (see Table 2).[2]

[1] For a more detailed discussion, see contributions in Niblock and Murphy (1993) and in Harik and Sullivan (1992).

[2] See World Bank, 1993, Table 17, p. 270. It should be noted that although Turkey's recent high growth rates have been industry-led, the economy still relies heavily on agriculture (small family farms of an average size of 8 hectares), albeit not as a major export earner (the principal agricultural exports are cotton, tobacco, wheat, fruit and nuts). In 1988 the agricultural sector contributed nearly 17 per cent of GNP (compared with 32 per cent by industry).

Other MENA countries with lower shares were Syria (15 per cent) and the Islamic Republic of Iran (3 per cent). Between 60 and 70 per cent of these exports went to OECD countries (World Bank, 1993, Table 17, p. 270).

The countries where the textiles and/or clothing industry is an important export sector and growing source of foreign exchange are Turkey, Tunisia, Morocco, and Egypt. (For comparative data, see Tables 4, 5 and 6.) Other countries (such as Syria, Jordan, and the Islamic Republic of Iran) produce mainly for the home market, although these countries hope to break into the world market.

In Morocco and Tunisia, the high participation rates of women in manufacturing are the result of the role played by labour-intensive export production in the manufacturing sector.

In these countries, women constitute a large part of the unskilled labour force in the food and garment and knitwear industries, and the share of female workers in factories producing for export markets is particularly high (UNIDO, 1993a, pp. 35 and 41). In her 1980 industry and labour analysis of Morocco, Joekes observed that the proportion of women workers was higher, both within and between firms, when the product was for foreign markets (Joekes, 1982).

Section two:
Structure of employment and characteristics of the labour force

Apart from their lower activity rates and their smaller numbers in services and sales occupations, MENA women's employment patterns are not dissimilar from global patterns. Globally, most women are crowded into a handful of occupations with little potential for advancement. According to one cross-national study of 25 industrial countries, 'on the average, women are over-represented in professional, clerical, sales, and service occupations, and substantially underrepresented in managerial and production jobs' (Charles, 1992, p. 490).

Throughout the world, the largest concentrations of women workers are in public and private services ('community, social, and personal services'), and especially in the areas of health, education and social welfare. The manufacturing sector claims over 25 per cent of the female labour force only in the East Asian NICs and in the former socialist countries, and in Tunisia and Morocco.[1]

Activity rates - the proportion of the economically active population in relation to the population of working age - remain lower in the MENA

continued on page 24

[1] Throughout the world, women's wages are on average less than those of men, especially in the manufacturing sector, where women tend to be clustered in low-wage, low-skill occupations in 'feminized' branches such as textiles and garments and food processing.

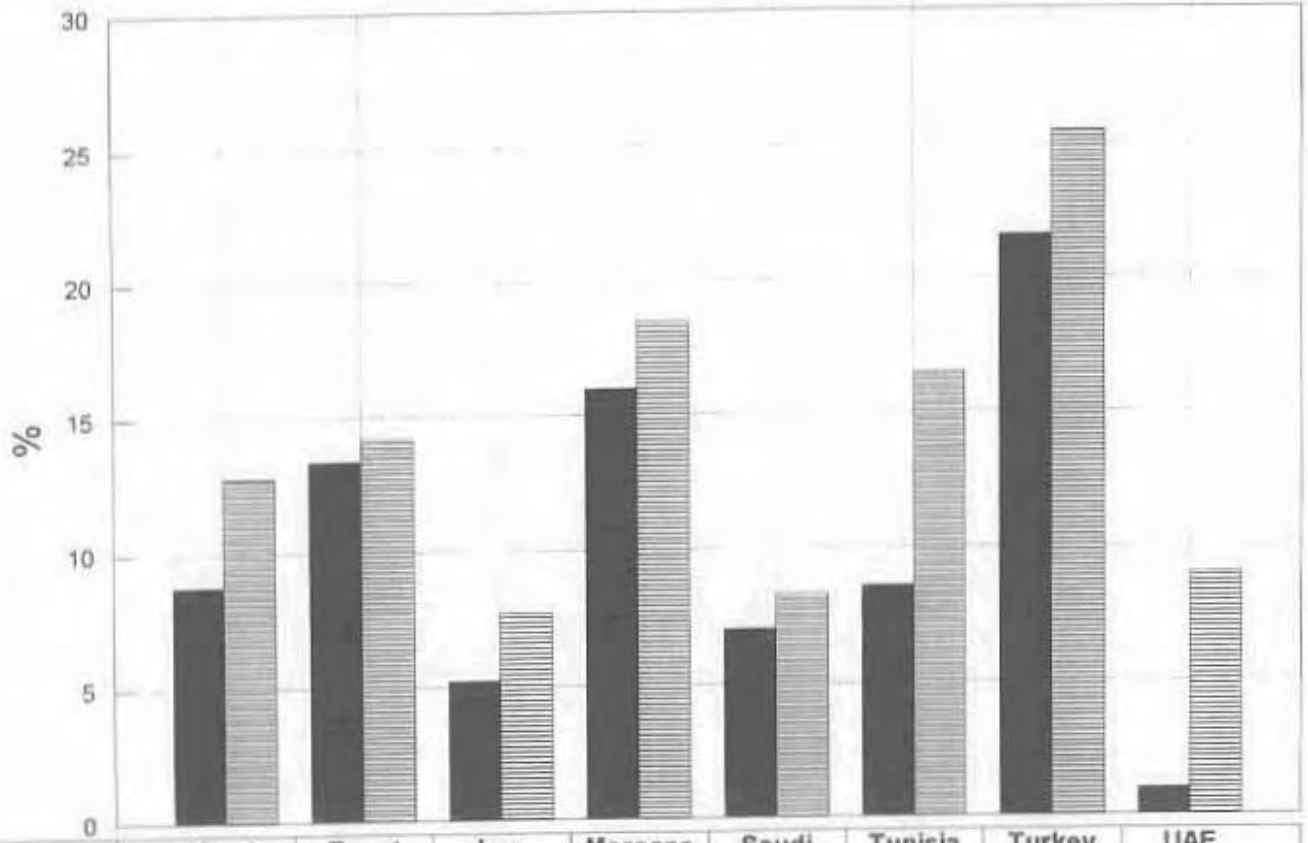
Table 1

Structure of production, MENA countries, 1970, 1991

Country	Population (millions)	GNP per capita		Distribution of gross domestic product (%)							
		Dollars	Average annual growth rate (%)	Agriculture		Industry		Manufacturing		Services, etc.	
	1991	1991	1980-91	1970	1991	1970	1991	1970	1991	1970	1991
Algeria	25.7	1,980	-0.7	11	14	41	50	15	10	48	36
Egypt	53.6	610	1.9	29	18	28	30	..	..	42	52
Jordan	3.7	1,050	-1.7	..	7	..	26	..	13	..	67
Iran	57.7	2,170	-1.3	19	21	43	21	14	9	38	58
Morocco	25.7	1,030	1.6	20	19	27	31	16	18	53	50
Oman	1.6	6,120	4.4	16	4	77	52	0	4	7	44
Saudi Arabia	15.4	7,820	-3.4	6	7	63	52	10	7	31	41
Syria	12.5	1,160	-1.4	20	30	25	23	..	..	55	47
Tunisia	8.2	1,500	1.1	20	18	24	32	10	17	56	50
Turkey	57.3	1,780	2.9	30	18	27	34	17	24	43	49
Yemen	12.5	520	..	..	22	..	26	..	9	..	52

Source: World Bank, World Development Report 1993, Tables 1 and 3.

Figure 2 Manufacturing's share of GDP



	Algeria	Egypt	Iran	Morocco	Saudi	Tunisia	Turkey	UAE
1970	8.8	13.4	5.2	16	7	8.6	21.6	1
1990	12.8	14.2	7.7	18.5	8.3	16.5	25.5	9

Data source: World Bank 1992

Table 2

% share of merchandise exports, MENA countries, 1970, 1991

Country	% share of merchandise exports									
	Fuels minerals and metals		Other primary commodities		Machinery and transport equipment		Other manufactures		Textiles and clothing	
	1970	1991	1970	1991	1970	1991	1970	1991	1970	1991
Algeria	73	97	20	0	2	1	5	2	1	0
Egypt	5	40	68	20	1	1	26	40	19	27
Jordan	24	38	59	16	3	1	13	44	3	4
Iran	90	90	6	7	0	0	4	4	3	3
Morocco	33	20	57	29	0	3	9	48	4	20
Saudi Arabia	100	99	0	0	0	1	0	0	0	0
Syria	62	62	29	15	3	1	7	23	4	15
Tunisia	46	21	35	11	0	7	19	61	2	33
Turkey	8	7	83	26	0	6	9	61	5	36

Source: World Bank, World Development Report 1993, Table 16.

Table 3

LEADING EXPORTS OF LARGE MENA COUNTRIES
1989-1990

Country and product	As percentage of total country	of developing country	of world
ALGERIA			
Crude petroleum	47.92	3.62	2.65
Gas, natural & manufactured	27.31	24.97	10.71
Petroleum products	20.76	6.02	2.58
EGYPT			
Crude petroleum	19.87	0.39	0.29
Textile yarn	16.34	6.59	1.92
Cotton	9.24	6.96	2.78
Petroleum products, refined	9.05	0.69	0.29
Aluminium	8.95	4.84	0.82
IRAN, Islamic Republic of			
Crude petroleum	88.93	9.07	6.63
Floor coverings, etc.	4.49	28.29	7.55
Hides, skins, excluding furs	1.85	3.82	1.45
Sulphur, unrstd iron pyrites	0.34	11.81	3.04
JORDAN			
Fertilizers, crude	38.91	29.12	23.11
Fertilizers, manufactured	12.94	5.09	0.96
Medicinal, pharm. products	6.11	2.88	0.17
KUWAIT			
Crude Petroleum	40.22	2.83	2.07
Petroleum products, refin	30.74	8.31	3.56
LIBYAN ARAB JAMAHIRIYA			
Crude petroleum	77.75	4.29	3.13
Petroleum products, refined	15.53	3.29	1.41
MOROCCO			
Fertilizers, crude	12.24	37.52	29.78
Fertilizers, manufactured	9.57	15.40	2.91
Inorganic elements, oxides etc.	6.87	12.16	2.21
Mens outerwear not knitted	6.01	3.28	1.46
Shell fish fresh, frozen	5.26	3.44	1.93
QATAR			
Crude Petroleum	71.07	1.53	1.12
Polymerization etc. products	6.39	3.18	0.41
Petroleum products, refined	5.94	0.49	0.21
Gas, natural and manufactured	4.58	1.19	0.51

continued...

...Table 3 continued

SAUDI ARABIA			
Crude petroleum	73.21	20.01	14.63
Petroleum products, refined	11.45	12.02	5.14
SYRIAN ARAB REPUBLIC			
Crude Petroleum	49.92	1.34	0.98
Petroleum products, refined	11.58	1.19	0.51
Woven man-made fibre fabric	6.04	3.12	1.08
Live animals for food	5.03	12.48	2.26
Cotton	4.63	4.71	1.89
Fertilizers, crude	1.73	4.96	3.94
TUNISIA			
Crude petroleum	16.40	0.40	0.29
Men's outerwear not knitted	13.57	6.29	2.80
Fertilizers, manufactured	8.56	11.70	2.21
Womens outerwear non knitted	6.70	2.11	0.92
Inorganic elements, oxides etc.	4.81	7.23	1.32
Outerwear, knit nonelastic	3.68	1.11	0.50
Lime, cement, building products	2.17	4.43	1.04
TURKEY			
Fruits, nuts, fresh, dried	6.73	12.67	4.82
Outerwear knit nonelastic	6.09	7.05	3.17
Headgear, nontextile clothing	5.12	11.72	6.72
Women's outerwear, non-knitted	5.04	6.08	2.65
Iron, steel shapes, etc.	4.85	20.33	3.23
Under garments knitted	4.26	10.03	4.74
Textile yarn	3.99	7.52	2.20
Tobacco unmanufactured, refuse	3.65	20.39	9.59
Iron, steel primary forms	3.10	9.56	2.22

Source: UNCTAD, *Handbook of International Trade and Development Statistics 1992*, Table 4.3 (NY: UN, 1993).

Table 4
Leading exporters of textiles and clothing, 1992

TEXTILES	Value 1992	Share in world exports 1980	1992
Germany	13.9	11.4	11.9
Hong Kong	11.0	-	-
domestic exports	2.2	1.7	1.9
re-exports	8.8	-	-
Italy	10.2	7.6	8.7
China	8.6	4.6	7.3
Korea, Rep. of	8.2	4.0	7.0
Chinese Taipei	7.6	3.2	6.5
Japan	7.1	9.3	6.1
Belgium-Luxembourg	6.5	6.5	5.5
France	6.3	6.2	5.4
United States	5.9	6.8	5.0
United Kingdom	4.3	5.7	3.7
Pakistan	3.6	1.6	3.1
Netherlands	3.0	4.1	2.5
Indonesia	2.8	0.1	2.4
Switzerland	2.3	2.8	2.0
Above 15	92.3	75.6	79.0

CLOTHING	Value 1992	Share in world exports 1980	1992
Hong Kong	20.1	-	-
domestic exports	10.0	11.5	7.6
re-exports	10.1	-	-
China	16.7	4.0	12.8
Italy	12.2	11.3	9.4
Germany	8.4	7.1	6.4
Korea, Rep. of	6.8	7.3	5.2
France	5.3	5.7	4.0
United States	4.2	3.1	3.2
Turkey	4.2	0.3	3.2
Chinese Taipei	4.1	6.0	3.1
Portugal	4.0	1.6	3.1
Thailand	3.8	0.7	2.9
United Kingdom	3.7	4.6	2.8
Indonesia	3.2	0.2	2.4
India	3.1	1.5	2.4
Netherlands	2.7	2.2	2.1
Above 15	92.2	66.9	70.5

Source: GATT (1993), Tables III.36 and III.42, pp. 66, 70.

Table 5
Exports of textiles of selected economies, by region, 1980, 1989 and 1992
($ million and %)

	Value			Share in economy's total merchandise exports	
	1980	1989	1992	1980	1992
MENA					
Egypt	259	587	395	8.5	13.0
Iran, Islamic Republic of	589	600	... **	4.5	3.1
Morocco	122	167	178	4.9	4.4
Turkey	343	1,331	1,619	11.8	11.0
ASIA					
Bangladesh	414	268	324	52.2	15.4
China *	2,540	7,215	8,583	14.0	10.1
Hong Kong	1,771	7,574	10,979	9.0	9.2
Pakistan	876	2,018	3,623	33.5	49.5
OTHERS					
Belgium-Luxemburg	3,550	5,297	6,457	5.5	5.3
France	3,432	4,967	6,254	3.0	2.7
Germany	6,296	11,073	13,857	3.3	3.2
Italy	4,158	7,886	10,154	5.3	5.7
United States	3,757	4,371	5,889	1.7	1.3

* Includes exports from processing zones.

** In 1991, 515.

Source: GATT, International Trade 1993 Statistics (Geneva, 1993), Table III.37,p. 67.

Table 6
Exports of clothing of selected economies, by region, 1980, 1989 and 1992
(\$ million and %)

	Value			Share in economy's total merchandise exports	
	1980	1989	1992	1980	1992
MENA					
Morocco	109	509	806	4.4	20.1
Tunisia	339	776	1,477	15.4	36.6
Turkey	131	2,741	4,179	4.5	28.5
ASIA					
Bangladesh	2	... **	1,080	0.2	51.2
China*	1,625	8,165	16,704	8.9	19.7
India	590	1,950	3,106	6.9	15.9
Indonesia	98	1,146	3,164	0.4	10.8
Korea, Republic of	2,949	9,096	6,770	16.8	8.8
Pakistan	103	722	1,456	3.9	19.9
OTHERS					
France	2,294	3,626	5,266	2.0	2.2
Italy	4,584	9,441	12,245	5.9	6.9
Mexico	47	... ***	999	0.3	2.2
Portugal	631	2,591	4,027	13.6	22.0
United States	1,263	2,211	4,211	0.6	0.9

* Includes exports from processing zones.

** 416 in 1988

*** 648 in 1990

Source: GATT, International Trade 1993 Statistics (Geneva, 1993), Table III.43, p. 71.

Table 7
Share of textiles and clothing in total merchandise trade and in manufactures by region, 1992 (%)

	Textiles		Clothing	
	Exports	Imports	Exports	Imports
Share in total merchandise				
World	3.2	3.2	3.6	3.6
North America	1.2	1.6	0.8	5.0
Latin America	1.6	2.5	3.3	2.4
Western Europe	3.3	3.1	3.0	4.1
Central and East Europe and the former USSR	1.5	4.5	4.6	3.1
Africa	1.4	5.0	4.6	1.4
Middle East	1.3	4.8	1.4	2.5
Asia	5.3	4.5	6.7	2.2
OECD Asia	1.9	2.2	0.2	4.5
Other Asia	8.0	5.6	11.8	1.0
Share in manufactures				
World	4.4	4.4	4.9	4.9
North America	1.6	2.0	1.1	6.3
Latin America	3.5	3.3	7.4	3.2
Western Europe	4.2	4.2	3.8	5.6
Central and East Europe and the former USSR	3.1	6.8	9.5	4.7
Africa	7.2	7.1	23.2	1.9
Middle East	7.4	6.2	8.2	3.2
Asia	6.5	6.6	8.2	3.2
OECD Asia	2.2	4.1	0.3	8.4
Other Asia	10.2	7.5	15.1	1.3

Source: GATT, International Trade 1993 Statistics (Geneva, 1993), Table III.35, p. 65, and Table III.41, p. 69.

continued from page 14

region than in other regions of the world. For women, activity rates are highest at the youngest years, with a marked tendency for women to drop out of the labour force upon childbirth. Married women who stay in the labour force, especially those in factory employment, prefer to leave before retirement age, unlike the men. Turkish statistics show higher activity rates for women in rural areas (50 per cent) than in urban areas (16-17 per cent), where activity rates are highest in the age groups 20-34 (State Institute of Statistics, n.d., Table 27.1, p. 41). Women employees tend to be younger than male employees, and women usually leave the labour force while in their thirties (DISK-AR 1992, p. 25).

The female share of the total labour force is still quite small in most MENA countries - for example it is only 10 per cent in Iran, Algeria, Jordan and Egypt and 15 per cent in Syria, the region's highest figures being 33 per cent in Turkey and 20 per cent in each of Morocco and Tunisia. In the urban areas of MENA countries the female labour force is distributed across public services (where employment is salaried), formal employment in public-sector and some large private enterprises, and smaller private-sector activities, where much of the employment is of a casual nature and where there is probably a high rate of exploitation.[1]

There seems to be better social protection and more conductive social policies in the public sector, although in recent years wages have fallen. Jobs in the public sector and in large enterprises in the private sector provide a number of important benefits and social services, such as sickness benefits and maternity leave, nursing breaks, child-care facilities, transportation, subsidized meals, and paid annual leave.[2]

According to a study for Egypt's Central Agency for Public Mobilisation and Statistics (CAPMAS) conducted by Malak Zaalouk (1990), women workers reported more sexual harassment in the private sector than in the government sector. For all these reasons, many educated Middle Eastern women prefer to work in public services/administration (their share is around 30 per cent), and the public-sector enterprises have also been favoured by job-seeking working-class women.[3]

[1] There is also significant undercounting of the female labour force in the urban informal sector and in the rural sector. Huge numbers of rural women are simply not counted in Iran, Jordan, and, until recently, Egypt. In countries such as Turkey, Tunisia, and Morocco, it is more the case that 'self-employed/own-account' women, women in unregistered workshops, and women who sew and knit at home as part of subcontracting arrangements, are vastly under-enumerated.

[2] Labour legislation requiring child-care and maternity leave could constitute a disincentive to hire women if the benefits are not government-subsidized. It could render female employees more 'expensive labour' and could be regarded by private sector employers as an additional 'tax' burden to be avoided. This seems to be the case in Egypt, where my fieldwork during January-February 1995 revealed that private sector employers in particular are reluctant to hire women because of maternity leave entitlements.

[3] There is anecdotal evidence that in Iran, some middle-class women may prefer to work in a private firm under foreign management, or in an international organization, due to the more relaxed atmosphere.

Education levels

In many MENA countries, female employees may be more educated than male employees. In Turkey, 30 per cent of female employees are graduates of high school, whereas this figure is 15 per cent for male employees. Moreover, only 8 per cent of male employees are university graduates, whereas 14.3 per cent of female employees have finished university. As a Turkish study observes: 'Apparently women are able to be 'active in economic life' only if they are well-educated' (DISK-AR, 1992, p. 24).

Unemployment is generally higher among educated women than educated men, and probably highest among those under 25 years old, most likely high-school or university graduates unable to locate employment commensurate with their credentials.[1] In industrial occupations, literacy and educational attainment are generally low for men and women workers alike, except in Jordan, where one sample study of food and textile industries found not only a higher level of education among workers but higher educational attainment among the women workers compared with the men workers.[2]

Female unemployment is quite high in a number of countries. ILO data show that in Syria, female unemployment in 1991 was 14 per cent and in Egypt 28 per cent. Female unemployment in Iran is 25 per cent, compared with an official rate of 9 per cent for men.[3] In Morocco urban unemployment rates are higher among women (20.4 per cent in 1986 compared with 13.9 per cent for men), youth, and those with primary and secondary education. In 1986 more than 30 per cent of the urban unemployed had their previous jobs in industry; most unemployed women had previous jobs in domestic or personal services (Karshenas, 1994, p. 47).

In the late 1980s in Tunisia, unemployment rates for males and females were 20 per cent and 30 per cent, respectively (Chérif, 1990, p. 20). In Turkey urban female unemployment rates have been declining from a high of 28 per cent in 1988; but at 20 per cent in April 1993 they are far higher than those for men (10 per cent). According to Turkish statistics, female unemployment is particularly high among women within the categories of 'non-agriculture production and related workers, transport equipment operators and labourers' (ISCO 7, 8, 9). In 1990 unemployment in that

[1] A 1992 report by the research department of the Turkish trade union DISK states that 'young people are dumped into the labor market without being adequately trained.' The report provides figures for enrolments in various vocational schools in the academic year 1989-90: 264,407 in vocational schools for men; 45,839 in vocational schools for women; 138,339 in trade and tourism schools. It wryly notes that 'the number of students in Imam Hatip religious high schools was 283,000' (DISK-AR, 1992, p. 31).

[2] ESCWA, 'Summary of Survey on Participation of Women in Food and Textile Industries in Five Arab Countries: Arab Republic of Egypt, Republic of Yemen, Republic of Iraq, Syrian Arab Republic, and The Jordanian Hashemite Kingdom' (Amman, manuscript, no date). Jordan is anomalous in that it has a low female labour-force participation rate despite relatively high educational attainment and a growing manufacturing sector.

[3] Data from ILO *Yearbook of International Labour Statistics 1993*, Table 9A, except for Iran, which comes from a personal communication from M. Changeezi, senior statistician, Central Statistical Office, Tehran, May 1994. The ILO figures for female unemployment in Turkey are different from those provided by the Turkish State Institute of Statistics, and I shall be using the latter.

category of workers was 27.39 per cent for women and 16.56 per cent for men (State Institute of Statistics, n.d., Table 25, p. 37). Women register higher unemployment rates than men in all categories of educational status, except for illiterates. The highest male-female unemployment differential was among those with vocational junior high-school education (UNIDO, 1993e, p. 2). It appears that in Turkey and Morocco, the unemployed women are a combination of new entrants to the labour market and workers formerly employed or made redundant. Overall, it seems clear that the supply of job-seeking women is increasing in MENA countries, whereas the demand for them is limited and inadequate to meet their employment and income needs. This may be a result of gender discrimination, whereby at a time of slack in the labour market employers discriminate by preferring to hire males who are seen as the breadwinners of the household.

In industry, women work predominantly in the textiles and garments' industry and in the leather industry. In the formal sector they are mostly production workers in low-skill and low-wage occupations. But unlike manufacturing workers in the NICs, who are mostly salaried, many women in the MENA region work in the private, non-organized sector.

Prevalence of homework and non-regular female employment

In Turkey, more than half the labour force still works on the land, because of the prevalence of peasant farming. About 75 per cent of the female labour force is found in agriculture, where the women's economic status is that of unpaid family worker. Cagatay and Berik (1990, p. 126) point out that relative to the distribution of women across economic sectors, a lower proportion of men are in agriculture (43.2 per cent in 1985) and a higher proportion in manufacturing (14.2 per cent in 1985). In 1991, of the 6.5 million women counted as economically active, only 441,562 were in manufacturing (compared with 2.2 million men), but, even so, 30 per cent of them were not regular salaried employees. It is interesting that despite the significance of the manufacturing sector in terms of contribution to GDP, the sector employs few women.[1] (See UNIDO 1993e, p. 43; ILO *Yearbook of International Labour Statistics 1993*, Table 2A; DISK-AR, 1992, p. 35.)

In Tunisia, only 49 per cent of the total female labour force was salaried in 1989; of the 165,700 women counted as manufacturing workers, only 84,400 (50 per cent) were salaried.[2] In Jordan in 1989, out of about 90,000 women in the measured labour force, some 52,711 were in paid employment in non-agricultural activities, and only 4,000 women were in paid

1 Incidentally, this is also the case in India. However, as mentioned above, it is no doubt also true that large numbers of women homeworkers are not counted - seamstresses, knitters, embroiderers in subcontracting arrangements with merchants or small enterprise owners. Small family enterprises where the male family members are paid but the female ones are not is also a pattern in Turkey. *See* Cinar, Evcimen, and Kaytaz (1988).

2 The data reported here are from the ILO *Yearbook of International Labour Statistics 1993*, Tables 2A, 2B and 5A.

employment in manufacturing.[1] In Syria, women's employment in manufacturing increased steadily in the 1980s to a high of 49,000, or about 12 per cent of the manufacturing labour force, in 1989. It then decreased to 34,600, or 7.6 per cent of the total, in 1991. In contrast, men's employment in manufacturing has been increasing consistently. Are women losing jobs in the formal sector, or is the informal sector being counted differently?

In Iran in 1986, out of a total of 990,000 women counted, only 507,472 (38 per cent) were salaried. In manufacturing employment, 216,320 women were counted, of whom 56,404 (26 per cent) were salaried. The 14 per cent of the manufacturing labour force that is female consists largely of unwaged private-sector workers. Indeed, the proportion of women in the private sector receiving a wage or salary was only 19 per cent - which does not bode well for future economic policies emphasizing growth of the private sector. For the small percentage of women in the formal sector, government employment provides many advantages.

Nearly all women who are waged and salaried are in the public sector, where they enjoy insurance, pensions, and other benefits. Labour legislation enacted in 1990 provides women with ninety days of maternity leave, at least half of which must be taken after childbirth. There is also a job-back guarantee with no loss of seniority and a half-hour break every three hours for breast-feeding, with a crèche provided at the workplace. But in the private sector most women are likely to be 'self-employed' or unpaid family workers in agriculture or rug-weaving workshops, where they have no benefits at all.

In Egypt in 1989, of the 310,500 women production workers, only 92,200, or about 30 per cent, were salaried. The total number of salaried women in Egyptian manufacturing (which would include blue-collar and white-collar), was 125,200 - compared with 1.2 million men in paid employment in manufacturing. It should be noted that this figure is not significantly higher than that for 1983 (110,800), suggesting that paid employment in manufacturing has not been expanding although, considering the increase in production and export of textiles and clothing, one assumes that casual labour has been growing considerably.

In Morocco, a study finds that the increase in female employment between 1971 and 1986, especially that recorded for rural areas, 'seems to be in the non-remunerated "family-labor" category' (Montoliu, 1989, p. 19). Since then, it is very likely that the expansion of Morocco's light manufacturing export industries, including textiles and garments, has not been accompanied by a growth of salaried employment. While industrial production, especially of export-promotion industries, grew faster than the rest of the economy (Pissarides, 1992, p. 23), it was probably accomplished partly through wage cuts (Karshenas, 1994) and partly through a growth of non-regular

[1] There appear to be some legal obstacles to women's participation in modern manufacturing. By law, women can work the day shift only (oddly, this does not pertain to the health sector) and thus many women workers and professionals are unable to apply for industrial jobs that require working in the second shift. (Interviews at Hikma Pharmaceuticals, Amman, 12 November 1994.)

labour, including much female homework. Artisanal goods, including rugs, are largely produced by homeworkers. A 1991 government study found that:

> D'abord pour les raisons socio-culturelles, ensuite pour des raisons économiques, le travail des femmes à domicile occupe une place de première importance. Dans la seule région de Rabat-Salé de 2,000 à 3,000 femmes fabriquent des tapis à domicile, sur une base épisodique. (Ministère de l'Artisanat, et al., 1991, p. 11.)

Export manufacturing and women's place in the labour market

Will current plans to cut back on the public-sector wage bill and to promote export-oriented private-sector activities improve or adversely affect women's already fragile place in the urban labour market? Will the expansion of export manufacturing offer working-class women only more low-wage, low-skill jobs in small enterprises or through homeworking arrangements? Unemployment rates, chronically high in some countries, could increase, especially if new entrants - which will include a growing supply of educated women, women maintaining households alone, or other women in economic need - cannot be accommodated in the modern sector.

The expansion of tourism could be a solution, but it should be noted that thus far, and unlike in other regions of the world, the service and sales occupations - for example, in retail trade, restaurants, and hotels, or jobs spawned by the tourism industry - are not large employers of women in MENA countries. For example, although current Tunisian economic policy is to promote tourism as a foreign exchange earner (see Proirier and Wright, 1993), it remains a heavily male-dominated sector. Women represent a very small percentage (6 per cent) of workers in trade, restaurants, and hotels.[1] (They are found in much larger numbers in other service subsectors, such as finance, insurance, real estate and business services, and of course in the education and health professions.)

In Turkey, women are also largely excluded from tourism, one of Turkey's fastest growing industries. Although nearly two million people are involved in trade, restaurants, and hotels, the female share of that workforce, at 86,000, is only about 5 per cent. It remains to be seen whether privatization and further liberalization will spur female-owned businesses and increase the demand for women employees.

In Morocco, privatization, export promotion and foreign investment are being vigorously pursued, although with rather less of the attention to human resource development that the Tunisian government devotes. A wide range of Moroccan businesses - including mining, textiles and paper industries, banks, insurance companies, and hotels - are slated for

[1] They are also rarely found in the urban informal sector, according to a study by anthropologist Richard Lobban, 'The Urban Informal Sector in Tunis: A Preliminary Report', a paper presented at the Annual Meeting of the Middle East Studies Association, Washington D.C., November 1991.

privatization. Spanish textile companies like Cortefiel have been moving production to Morocco because labour costs are less than 25 per cent of European levels. They expect to exploit both the growing domestic market and the potential for using the country as a low-cost base for exports to Europe. Another reason for foreign investment is that, without it, a demographic explosion, expected to swell the population from 25 million to 40 million by early next century, could prompt millions more Moroccans to cross the eight miles of water separating them from an increasingly xenophobic Europe.[1]

Nevertheless, while luring foreign investment as a way to spur growth and create jobs, other policies create unemployment (male and female alike), such as restructuring of the industrial and construction sectors. According to one account, female unemployment is as high as 20 per cent in urban areas, suggesting that 'either the women [are] losing jobs from services or [those] now entering the labour force with some school qualifications are unwilling to work in the new factories at current rates of pay, or that the economy elsewhere is contracting faster than the new industries are expanding' (Pissarides, 1992, p. 23).

In Egypt, a study by CAPMAS found that 'the position of women in the labour market is precarious, since they are largely unpaid workers'; that their multiple roles and role conflicts add to their vulnerability; and that very few women are able to save any money. It should be noted that in Egypt, very few women are wage workers in the private sector, suggesting the existence of discriminatory barriers to their entry. Summarizing the results of the December 1987 Egyptian Labour Force Sample Survey, Al-Qudsi, Assaad, and Shaban (1993, p. 55-6) point out that unskilled females receive much lower wages than unskilled males in the private sector. The wage gap declines, but does disappear altogether, at higher levels of education. It is interesting but not surprising that there appears to be no wage gap in the government sector and a smaller gap for the public enterprise sector, especially at higher levels of education. The CAPMAS report cited inadequacy of wages in the private sector, the largest employer of women, and noted that with privatization, income differences will grow and 'may bring more discrimination against women'.[2]

Section three:
Women in the textiles and garments industry: some cases

In terms of women's role in the manufacturing sector, and based on the official statistics only, MENA countries can be divided into the following groups:

- countries with export-oriented policies and significant female participation in manufacturing (Morocco and Tunisia)
- countries with export-oriented policies but insignificant female participation in manufacturing (Turkey)

continued on page 32

1 See *New York Times*, 'Its Economy Rising, Morocco Lures Investors', 11 November 1993, p. A6.
2 Cited in *Al-Ahram Weekly*, 7 March 1991.

Table 8
Participation of women in manufacturing, some MENA countries and selected NICs

Country	Latest Year	Total manufacturing Work force (A)	Number of women in manufacturing (B)	Number of (B) who are salaried (C)	Female share of total B/A %
Algeria	1977	261,706	18,187	16,479	6.9
	1985	595,000	40,632	35,790	6.8
Egypt	1989	1,958,700	344,600	125,200	17.6
Iran	1986	1,460,132	216,320	56,404	14.8
Iraq*	1977	284,395	48,618	27,217	17.1
	1986	386,809	44,680	-	11.6
Jordan	1989	32,438	4,040	4,038	12.5
Kuwait	1988	54,664	1,433	-	2.6
Morocco	1982	930,615	336,877	-	36.2
Syria	1991	456,162	34,600	24,099	7.6
Tunisia	1989	382,700	165,700	84,400	43.3
Turkey	1992	3,174,911	799,450	364,076	25.2
South Korea	1992	4,768,000	1,917,000	1,653,000	40.2
Mexico	1990	4,493,279	1,057,059	909,340	23.5
Malaysia	1988	987,300	449,200	352,500	45.5
Thailand	1990	3,132,500	1,563,700	1,089,700	49.9
Venezuela	1991	1,206,395	335,150	197,522	27.8

- indicates data not available

Sources: ILO Yearbook of Labour Statistics 1993, Table 2A; ILO, Restrospective Edition on Population Censuses, 1945-1989, Table 2A; ESCWA, "Executive Summary, Participation of Women in Manufacturing Industries in Western Asia" (mimeo).

Table 9
Percentage of females among production workers

Country	Year	All statuses*	Salaried**
Algeria	1966	4.0	2.4
	1987	2.5	2.4
Egypt	1975	2.4	2.8 (76)
	1984	5.8	-
Iran	1966	25.0	18.2
	1976	19.8	7.9
	1986	6.3	3.2
Iraq	1977	5.5	3.7
	1987	4.0	-
Jordan	1979	1.0	-
Lebanon	1970	10.0	8.1
Morocco	1971	15.5	-
	1982	23.0	-
Syria	1970	5.3	4.0
	1981	4.0	3.0
	1984	3.8	-
	1991	3.2	3.4
Tunisia	1975	23.9	10.5
	1980	22.1	-
	1984	17.6	-
Turkey	1992	8.0	7.0
Malaysia	1970	17.4	-
	1980	21.6	-
	1988	25.1	-
Mexico	1970	12.8	10.9
	1980	16.8	15.3
South Korea	1975	28.0	27.7
	1980	25.8	28.5
	1988	31.1	29.3
	1989	31.0	31.6

* Includes own-account, employer, unpaid family worker and wage worker.

** This column refers to the female share of salaried production workers.

- indicates data not available.

Sources: ILO, Yearbook of Labour Statistics 1993, 1989-90, and Retrospective Edition of Population Censuses, 1945-1989, Tables 2A, 2B, 2C; National Census of Population and Housing, Iran, November 1986 (Total Country, Table 14, p. 39) (Tehran: Central Statistical Office, 1987); Guy Standing, "Global Feminisation Through Flexible Labour" (Geneva: ILO, 1989), Tables 4 and 5; Sixth Malaysia Plan 1991-1995, Ch. XVI, "Women in Development".

continued from page 29

- oil-rich Gulf states with low female economic activity (which could increase, however, as a result of reduced reliance on imported male labour) and little overall manufacturing activity (Bahrain, Kuwait, Saudi Arabia, Qatar, the UAE)
- oil-producing and exporting states with low female labour-force participation and minimal presence in manufacturing (Algeria, Islamic Republic of Iran)
- non-oil or mixed-economy states with a growing manufacturing sector and exports but continued low female labour-force participation and involvement in manufacturing (Jordan, Syria, Egypt)

In Egypt, the Labour Force Sample Survey of 1989 counted 344,600 women in the manufacturing sector (compared with 1.6 million men), of which 125,200 were salaried. This was out of a total female labour force of 4.6 million - over half of whom are in agriculture. The textiles and clothing industry is rather sex-segregated: Egyptian women have traditionally performed home-based work that does not involve mixing with men. Most women produce textiles, ready-made clothes and leather products, and there is some

Table 10
Wages in manufacturing, Egypt 1985-1987

(Earnings/week) Pounds 1)

		1985	1986	1987
Males				
311-312	Food	28.00	30.00	33.00
313	Beverage	30.00	29.00	37.00
314	Tobacco	34.00	46.00	45.00
321	Textiles	27.00	30.00	36.00
322	Apparel	30.00	33.00	31.00
Females				
311-312	Food	17.00	21.00	21.00
313	Beverage	21.00	28.00	28.00
314	Tobacco	22.00	35.00	32.00
321	Textiles	18.00	21.00	25.00
322	Apparel	33.00	18.00	20.00

1) Establishments with 10 or more persons employed.

Source: ILO, Yearbook of Labour Statistics 1993, Table 17 B, p. 861.

engagement in the chemical, metal and food industries.

A UNIDO study mentions that there is a taboo in Egypt against the use of foot-pedal looms by women, and so they do not weave on these looms and are not employed in workshops (UNIDO, 1993b, p. 2). Though the women's role in production is peripheral in weaving, it is central to the production of *versalia*, a very stiff fabric used by the ready-wear clothing and luggage markets, especially in Cairo. 'Women work within the household and are organized by male household heads. They are not paid for this time-consuming work' (UNIDO, 1993b, p. 2).

Since most of the national industries are concentrated in the urban areas, the female industrial labour force is predominantly urban. In the factories, most of these female industry workers are unskilled or semi-skilled, performing repetitive tasks. They are located at the bottom of the hierarchy levels and rarely become supervisors. Lack of education and inferior status in the labour market results in, and is reinforced by, limited access to technical, vocational, and entrepreneurial training. For these reasons, women's wages are far below men's, as shown in Table 10.

Wages are higher and of course stable in state-owned enterprises, and it is here that male workers have a distinct advantage. Women constitute only 13 per cent of the labour force in public enterprises. For example, of the 30,000 workers at Misr Spinning and Weaving in Mahallah, only 5,000 are female, mostly working in the nine ready-made garments' workshops. According to the chairman:

> We tried to let women work in spinning and weaving, but it did not succeed. Mostly men work in spinning and weaving, especially since it involves shift-work. And we have enough men for these tasks.[1]

Since nationalization in Egypt in 1961, the textile industry has been dominated by the public sector, is male-intensive, and produces yarn for export; in contrast, the ready-made garments' sector, where most of the women are engaged, 'was nothing more than a cottage industry until the early 1970s [and] is dominated by the private sector' (Abdel-Latif, 1993, p. 1,678). In 1979, textile enterprises employed around 300,000 people, representing 38 per cent of total employment in public enterprises (Henley and Ereisha, 1987, p. 497). Unlike in the garments' industry, where labour was quite dispersed, the state-owned textile industry was large and quite concentrated; the six largest companies employed 45 per cent of the workers, and one of them employed over 24,000 workers (Henley and Ereisha, 1987, p. 498).

After the open-door policy (*infitah*) of the Sadat government, the ready-made garments' industry 'was particularly appealing to the private sector because, unlike textiles, clothing does not require large investments' (Abdel-Latif, 1993, p. 1,678). In recent years, knitted and woven ready-made garments have been produced for export, but this remains

[1] Author's interview with Mr El-Momtaz Billah-Abdel-Maksoud, Chairman, Misr Spinning and Weaving, Mahallah El-Kubra, Cairo Governorate, 23 January 1995.

relatively insignificant thus far, whether compared with Egypt's exports of textile yarn and cotton, or compared with the volume of clothing exports of Turkey (let alone of East Asia). State-owned enterprises are slated for privatization, but thus far the unions have opposed this course. As in Morocco and Turkey (see below), and of course many other countries, trade unions seek to protect their members' jobs, but the membership is largely male. Thus most men in the manufacturing sector, including the textile industry, have salaried jobs with social security (1.2 million out of 1.6 million male manufacturing workers) while an insignificant number of women manufacturing workers are salaried and the rest are homeworkers, without regular wages and of course without benefits.[1]

In a survey of the Moroccan clothing industry conducted in 1980, Susan Joekes found a preference for female workers: 'the great majority of employers, whether or not doing subcontracting work, profess a preference for female labour' (Joekes, 1985, p. 187). But this seems to be because of their cheapness relative to men: 'Production sections using only women workers were the lowest paid in the factory: assembly line jobs were taken by both men and women, but the men earned more. There was an almost complete male monopoly of the supervisory and most skilled manual jobs, where earnings were many times greater than those of the lowest ranked women workers' (Joekes, 1985, p. 186).

Joekes also found that most women workers were young and unmarried, were considerably better educated than the men, were more stable in employment, and did not have lower productivity than the men workers. Nevertheless, they received lower wages, apparently because it was widely felt that they were only 'working for lipstick' rather than assuming the burden of a household, as presumably the men do.

Joekes found that all the men in the survey came into the factory sector with experience of clothing production in small workshops which employ only men and boys on apprenticeships. By contrast, most women who came into the industry had had no experience at all, and only a minority had any knowledge of sewing. She also found that the operation of specialized sewing-machines such as zip-fitting, button-holing, and double-needled seaming machines, placed off the assembly line, were considered skilled jobs for which wages were about 50 per cent higher than for simple line machining. These jobs were all filled by men (Joekes, 1985, p. 201).

[1] Labour and social security laws in Egypt, a legacy of the Nasser years, have been quite generous. In 1959 the Labour Act reduced working hours to 8, increased sick benefits, guaranteed 14 annual paid holidays, gave protection against dismissal, set minimum wages, and established the right to joint consultation on safety, training, and working conditions; it also reduced the number of trade unions. Pension schemes were extended to all employees. In 1964 social security laws consolidated and extended their provisions to provide disability pensions and death benefits, health insurance, and protection during unemployment (Henley and Ereisha, 1987, p. 494). Women are entitled to three months' paid maternity leave and to up to two years' unpaid leave (one year in the private sector) which they can take up to three times (see Moghadam, 1995).

In the factories with less advanced equipment men were also the ones in the pace-making positions, which confers additional authority on the male workers and forces discipline on the female workers.

Although female-headed households are on the rise in Morocco, Joekes found that the majority of women workers in clothing (68 per cent) were 'young, unmarried daughters from stereotypical households (in the main, nuclear family units)...sent out to work by their parents for whatever wages are on offer...Their earnings are an important contribution to the household finances: only one or two women in the sample do not turn over most or all of their wages to their parents. In this respect, young women workers differ from their male co-workers, and from their working brothers; men do not contribute in the same way to the household finances, even when they are in the same position of living with parents. They keep their earnings for themselves' (Joekes, 1985, p. 207). Hardly a case of women working for lipstick!

Women workers may have been at a disadvantage partly because of their low trade union participation as compared with men: 'The Moroccan unions have also acted effectively to advance male interests, pressing for wage increases for their own (male) members and, latterly, attempting to save their jobs in the face of heavy unemployment' (Joekes, 1985, p. 192). Moroccan labour law exempts an employer from the requirement to accept unionization if his workforce is less than 50, but employers told Joekes that the real ceiling is about 150 workers. As the average workforce size of a clothing factory in Morocco was 70, this effectively meant no unionization of women workers in the clothing industry, although the unions had made inroads into the knitted goods' firms.[1] Joekes also found evidence that employers used female labour to outflank the unions. 'Of the tailored clothing firms studied in the sample, at least two had in fact closed down operations at some point in the past, sacked the whole workforce, then re-engaged the female members when the factory was opened up again a few weeks later, and brought up the numbers with more women' (Joekes, 1985, p. 203).

In Turkey, government emphasis on export-led growth has increased the manufacturing labour force. The textile and clothing industry is Turkey's largest, accounting for about one-third of manufacturing employment and contributing about 20 per cent of manufacturing output. In 1990, garments constituted 24 per cent of Turkey's exports; an additional 6 per cent was provided by textiles (UNCTAD, 1992, Table 4.3). In the manufacturing sector as a whole, 84 per cent of the paid employees are men.

The most female-intensive industries, in both public but especially private manufacturing, are those of apparel, textiles, tobacco and pottery. The 1985 census showed that the share of female employees in the manufacturing sector was about 17 per cent; in 1990 the female share was about the same (DISK-AR, 1992, p.

[1] This may have changed since 1980, and needs confirmation. As mentioned below, in Turkey's case, unionized women are precisely the wage workers in manufacturing, including textiles and garments.

35). Official data based on surveys of manufacturing sector enterprises with 25 or more workers show that in 1990 women represented 22 per cent of all workers (down from 25.7 per cent in 1985), 30 per cent of clerical workers, 12 per cent of executive managers, 6 per cent of foremen, and about 10 per cent of technical personnel.

In the textiles and garments branch in 1990, women production workers were nearly 41 per cent of the total (unchanged from 1985), 27 per cent of public-sector enterprises (up from 19 per cent in 1985) and nearly 43 per cent of private-sector enterprise workers. In this branch, women are also well-represented among executive managers (20 per cent), foremen (16.5 per cent), and high- and medium-level technical personnel (22 per cent). (Data from State Institute of Statistics, n.d., Tables 38 and 39. See Table 11, page 39.)

Annual manufacturing survey data covers only large establishments with 10 or more workers (Cagatay and Berik, 1990, p. 123), and sometimes 25 or more workers, as in the survey discussed above. This may account for the low recorded percentage of women in manufacturing, and suggests that large numbers of women in small, unregistered workshops, or those who work at home, are not being enumerated. As in Egypt, homeworking among Turkish women is very common, particularly in textiles and garments. Indeed, the results of the Household Labour Force Survey conducted in 1988 indicated that women constituted 89.9 per cent of all manufacturing homeworkers (UNIDO, 1993e, p. 3). Mine Cinar (1991, 1993) has shown that a large part of unreported or 'disguised' female employment takes place at home, where the woman, besides domestic duties, produces marketable goods by taking in piece-work at home. This strategy is favoured by employers for being cheaper than the cost of hiring workers at the minimum wage and paying the employer's contribution to social security.

Homework is also part of small family-owned enterprises. One study found that family labour, and in particular the unpaid work of women, was critical to the survival of the small-scale enterprises surveyed in Bursa: 'Those that did not have access to female family labor due to the nature of the production process (such as metal casting), did not do well when market conditions changed against them' (Cinar, Evcimen, and Kaytaz, 1988, p. 299).

Unskilled and migrant female homeworkers do not enjoy legal protection or minimum wage regulations. Thus not only is the labour market in Turkey highly segmented along gender lines - and occupational segregation appears to rise over time, according to one study (Zeytinoglu, 1988) - but the female labour force is quite differentiated, with the largest category consisting of unpaid agricultural workers, rural carpet-weavers, unpaid family workers, and urban informal-sector knitters, seamstresses and embroiderers; while a far smaller group consists of relatively privileged professional women or other white-collar women employees and about 450,000 workers in the manufacturing sector who are beneficiaries of fairly generous labour codes, social security

entitlements, and services such as crèches and pre-school facilities.[1]

Unsurprisingly, given the low figures of women's employment, the vast majority of trade union members in Turkey are male, as in Morocco, but it should be noted that the manufacturing sector accounts for nearly half of all unionized women.[2] Ecevit's research in Bursa in 1980 showed that 'women working in the large [textiles and garments] factories tended to be trade union members, whereas women working in the smaller factories tended not to be union members' (Ecevit, 1991, p. 73).[3]

The demand for female labour may be rising in Turkey, but this is mainly in the export-led private sector. Citing the results of the 1985-6 Manpower Training and Requirements Survey, Cagatay and Berik (1990, p. 124) explain that: 'while in private manufacturing 38.43 per cent of the demand for labour was for women, in public manufacturing this figure was only 8.18 per cent'. Cinar (1991, p. 9) writes that, in the formal industrial sector in general, the demand for unskilled females is predominantly for young, single females, whose work horizon is limited, who do not require severance pay, and who are willing to take on entry-level positions. This may explain women's lower average weekly earnings relative to men, as seen in Table 11. The demand for unskilled females in subcontracting arrangements in informal labour markets is similarly based on a cheap-labour calculation: payment per satisfactory piece produced is less than the cost of hiring workers at minimum wage and paying the workers' social security.

Will this demand for cheap female labour eventually confirm the Standing thesis of feminization of labour? Cagatay and Berik assert that 'one could talk of a defeminization in public manufacturing and a feminization of employment in the private sector' with the switch to export-led industrialization. Still, they conclude with the well-known observation that women have higher representation when an industry is more export-oriented, more labour-intensive and has a high ratio of non-skilled to skilled production workers.

And, of course, they note: 'we cannot rule out the possibility that gender composition of overall manufacturing employment may have

[1] This pertains to both state economic enterprises and large privately owned establishments. In June 1994 the author visited a garments' factory of Sumerbank, a state economic enterprise (SEE) slated for privatization, and Vakko, a large and up-market private enterprise (family-owned). Both had generous maternity-related benefits and services for women workers.

[2] A 1991 OECD study on employment in Europe showed that women's share of total union membership in 1989 in Turkey was, at about 14 per cent, the lowest in Europe. In the Netherlands and Switzerland the female share was about 20 per cent; the highest shares were in Finland and Sweden where they were 50 per cent. In terms of union density by sector, 48 per cent of female union members in Turkey were in manufacturing. (See Hastings and Coleman, 1992.) At both Sumerbank and Vakko, women workers were unionized by the Turk-Is trade union.

[3] Ecevit goes on to say that 'women's membership of trade unions was only formal, being limited to the payment of union dues which were automatically deducted from their wages. They participated very little in union activities and did not usually identify themselves as workers or develop trade union consciousness. Moreover, the local union officials in Bursa paid little attention to the women workers' (p. 73). Later, she writes that the women workers wanted to have women shop stewards because they found communication with the male shop stewards to be difficult (p. 76).

changed in favour of women under the export-led regime through the use of flexible labour supplied by women outside the large manufacturing establishments' (Cagatay and Berik, 1990, quotes from pp. 125, 128 and 130). This accords well with Cinar's findings that employers 'preferred farming work out to homes because this gave them a lower wage bill, lower overhead costs and flexible production to cope with fluctuating market demand. The types of labour-intensive output they sold, such as hand-knit sweaters for the export market, could only compete in international markets when they were produced by home work' (Cinar, 1991, pp. 22-3).

Tunisia's industries range from traditional artisan activities, such as textiles and leather, to 'downstream' industries based on the processing of the country's phosphate reserves. More than half of Tunisia's industry is located in Tunis. In the past, manufacturing tended to concentrate on processing of raw materials, especially foodstuffs, and was aimed at meeting local demand. In an attempt to attract foreign investment and to promote exports, the government ratified a new industrial investment code in 1987, and exports became the driving force behind GDP growth. Thus, in 1988, manufactures constituted 47 per cent of total exports and were 56 per cent higher than in 1986 (World Bank, 1991, p. 539). The garments' sector is one of Tunisia's leading non-oil industries, accounting for 26 per cent of total export earnings in 1990 compared with petroleum's 16 per cent share. While exports of petroleum and derivatives earned TD 418.3 million in 1987, exports of clothing and accessories earned TD 354.7 million (Harris, 1989, p. 842). In US dollar terms, in 1990, crude oil exports earned Tunisia some $527.3 million, while exports of clothing amounted to $922.1 million. There are about 1,100 companies registered in the sector, of which 450 are wholly or partly export-oriented.[1]

The manufacturing sector has been the most female-intensive sector of the Tunisian economy and labour force, and the female share of production workers is relatively high, especially in the textiles and garments' industry as well as in the agro-food, leather, and pharmaceutical industries. According to a UNIDO report, women's industrial employment is characterized by horizontal segregation, whereby women have access only to a narrow range of jobs, and vertical segregation, whereby women are situated at the lowest echelons of the hierarchy, thus receiving 20-25 per cent less than the wages given to men (UNIDO, 1993d, p. 3).

Women's industrial participation has declined, however, over the years. In 1975 women constituted 24 per cent of production workers; in 1980 the figure was 22 per cent; according to the 1984 census the figure was down to 17.6 per cent; and according to the 1989 Labour Force Sample Survey women were 18 per cent of production workers. With respect to manufacturing, 51.6 per cent of workers were women in 1975; in 1984, of the roughly 318,000 employees in this sector, fully 55 per cent were female (Moghadam, 1993, Table 2.2, p. 40). By 1989, and according to the Labour

[1] Data on Tunisia's export earnings are from UNCTAD, *Handbook of International Trade and Development Statistics 1992*, Table 4.3.

Table 11
Employed persons in selected manufacturing branches by sex, by occupational status, and by ISIC level, Turkey 1990

[Establishments where 25 or more persons are engaged]

A: Total B: Public C: Private

ISIC 31 = Food/Beverages/Tobacco
ISIC 32 = Textiles/Garments/Leather
ISIC 39 = Other manufactures

			Production worker																			
			Technical personnel																			
			High level			Medium level			Foreman			Workers			Executive managers			Clerical workers			Other		
ISIC		Number of establishments	Male	Female	Female (%)	Male	Female	Female (%)	Male	Female	Female (%)	Male	Female	Female (%)	Male	Female	Female (%)	Male	Female	Female (%)	Male	Female	Female (%)
Total	A	5594	17815	2456	12.12	21980	2335	9.60	67472	4421	6.15	490917	141969	22.22	24497	3494	12.48	56027	22061	28.24	91853	9849	9.68
	B	543	4861	574	10.56	5753	363	5.80	23927	467	1.67	128275	20421	13.73	5048	560	9.99	13605	4234	23.73	36842	2098	5.37
	C	5108	12091	2019	13.26	16364	2169	11.70	43682	4151	8.68	362779	121685	24.81	19586	3071	13.55	42559	18964	30.92	55148	7978	12.64
ISIC 31	A	986	2552	311	10.96	3462	178	4.89	9137	371	3.90	84056	30161	26.22	4520	493	8.19	10293	3335	25.66	22651	1891	7.71
	B	215	1024	102	9.06	1113	30	2.62	4193	73	1.71	40800	12648	23.66	3102	87	8.88	3669	1191	24.51	11594	872	7.00
	C	765	1528	212	12.18	2349	148	5.93	4944	298	5.68	44056	17513	28.44	3128	316	9.18	6624	2362	26.29	11057	1019	8.44
ISIC 32	A	1697	1028	822	21.35	3339	930	22.29	14960	2956	16.55	124472	86043	40.87	4803	1226	20.04	8998	5038	39.76	13417	3801	22.44
	B	169	476	199	29.48	323	159	32.99	2479	218	7.95	16785	6147	26.81	485	161	24.92	756	519	40.71	2175	548	20.12
	C	1625	2689	760	22.04	3151	936	22.89	12618	2859	18.63	107824	80053	42.60	4545	1202	20.92	8577	5356	39.88	11379	3470	23.37
ISIC 33	A	167	305	26	7.85	304	7	2.25	2268	25	1.09	10284	787	7.11	382	61	10.33	1003	388	27.85	1605	113	6.58
	B	23	98	10	9.26	37	0	0.00	1469	4	0.28	2777	70	2.46	93	5	5.00	306	128	29.47	786	42	5.07
	C	144	207	16	7.17	267	7	2.55	859	21	2.39	7507	717	8.72	287	56	11.36	699	260	27.28	819	71	7.98
ISIC 34	A	217	669	71	9.22	862	89	10.20	8751	95	1.96	68527	1212	6.83	1018	169	14.24	2942	1200	28.97	5268	420	7.53
	B	35	239	26	10.16	120	12	9.09	2895	36	1.27	8462	685	7.30	218	29	11.74	996	318	24.21	2826	84	2.73
	C	198	469	45	8.75	742	87	10.49	5948	59	2.94	20015	727	6.55	800	140	14.89	1952	882	31.12	2842	335	10.54
ISIC 35	A	549	2501	318	10.45	8721	335	7.72	7863	325	3.92	61408	6243	13.08	3369	686	11.88	8672	3411	27.23	14304	936	6.14
	B	30	919	98	9.47	2396	21	0.87	3654	10	0.33	8748	87	0.98	1213	143	10.55	1768	547	23.63	6173	115	1.83
	C	518	1678	418	19.96	2325	374	13.86	4905	315	6.03	52750	6156	15.82	2090	543	11.29	7304	2864	28.17	8128	821	9.17
ISIC 36	A	481	1003	118	9.54	1400	88	5.88	6231	93	1.47	43187	5241	6.98	1369	132	8.84	4223	1164	21.62	7534	194	2.51
	B	29	102	36	15.79	115	21	15.31	1130	2	0.18	6483	292	4.31	366	16	5.87	634	177	21.30	2283	33	1.42
	C	455	901	82	8.34	1291	67	4.93	5101	91	1.75	36703	2949	7.44	1003	116	7.16	3567	987	21.67	5251	161	2.97
ISIC 37	A	266	1771	89	4.78	2028	59	2.83	8484	58	0.68	90037	331	0.67	1474	162	9.90	3563	1368	21.99	10082	317	3.05
	B	16	1038	51	4.69	1171	25	2.09	6287	45	0.71	27362	147	0.53	673	52	7.17	3108	840	21.28	7784	173	2.18
	C	250	733	38	4.92	857	34	3.83	2197	13	0.59	62675	184	0.83	801	110	12.07	2455	728	22.87	2298	144	5.85
ISIC 38	A	1213	3093	496	8.01	3746	333	8.50	13301	435	3.17	122531	13618	9.50	6413	812	11.24	13689	5706	29.40	16764	2049	10.90
	B	35	875	51	5.51	163	35	7.00	2473	13	0.52	19389	511	2.63	698	67	8.76	2549	541	17.89	3603	131	3.51
	C	1178	2219	445	8.45	4273	498	8.63	30830	422	2.75	103082	12507	10.64	5715	745	11.53	11349	5193	31.38	13161	1918	12.74
ISIC 39	A	81	81	4	4.71	115	18	13.53	370	53	12.27	2105	329	26.60	117	61	33.98	244	138	35.94	251	59	13.45
	B	1	15	1	6.25	7	0	0.00	97	10	9.35	288	34	14.05	5	0	0.00	14	6	30.00	38	9	8.99
	C	80	66	3	4.35	108	18	14.29	282	43	13.23	1817	804	32.03	108	61	35.96	232	132	36.26	213	39	15.48

Source: State Institute of Statistics, 'Main Woman Indicators, Turkey, 1978-1993', Table 39, p. 54.
Note: The selection of industrial branches is based on female-intensity

Table 12
Wages in manufacturing, Turkey 1)
(Earnings per week/liras)

ISIC		1988	1989	1990	1991
Males					
311-312	Food	7399	17216	29915	58746
313	Beverage	8216	23272	37471	75034
314	Tobacco	7026	34964	45449	91447
321	Textiles	7166	15684	23515	60506
322	Apparel	6943	12631	19748	39738
390	Other	7244	14095	25051	42772
Females					
311-312	Food	5945	8892	21562	43436
313	Beverage	7341	16356	30784	68496
314	Tobacco	5158	12189	25366	..
321	Textiles	4807	12573	18428	55308
322	Apparel	5238	9850	17480	39738
390	Other	5021	14344	22169	46010

1) Insurance statistics: employees.

Source: ILO, Yearbook of Labour Statistics 1993, Table 17 B, p. 910.

Force Sample Survey of that year, the proportion of women in manufacturing industries had declined to 43.2 per cent of all manufacturing employees. This decline suggests either that women have been losing jobs because of restructuring, or that new entrants are not accepting industrial jobs at current pay levels.

In Iran, manpower and census data of the 1970s reveal that the majority of active women were employed in manufacturing, while agriculture and services accounted for an additional 46.2 per cent of female employment. The high rate of female employment in manufacturing is due to the inclusion of cottage industries in this sector. In fact, in 1971 more than half of the economically active women in rural areas worked in small textile workshops. More than 88 per cent of these were carpet-weaving workshops; the rest comprised such crafts as spinning, knitting, and rug-weaving. Although more and more women filled white-collar positions in the growing public and private sectors, the majority of women in the workforce were unpaid workers in small urban workshops or in family farms. In 1976, only 55 per cent of urban women, and 30 per cent of rural women, were literate.

Ten years after the revolution, the Iranian economy was still oil-based, with exports of crude petroleum or oil products accounting for most of the country's export revenues. No clear policy had been formulated for the industrial sector. Steel, petrochemicals and copper remain the country's three basic industries, and these are capital-intensive, male-intensive industries. Defence-related industries, which expanded during the war with Iraq, were also dominated by men. Traditional exports include cotton, carpets, pistachio nuts, fresh and dried fruits, hides and caviar. 'New' industrial products include knitwear, textiles, clothes, metal ores, pharmaceuticals, chemicals, soaps, detergents and shoes. Of the modern manufacturing plants that were established under the Shah's regime, those which remained in production (estimated at only 20 per cent of the total by value of output) encountered serious difficulties. At the end of 1988 it was reported that most factories were operating at less than 50 per cent of their capacity, owing to shortages of raw materials from abroad (Fisher, 1989, p. 440).

The stated policies of the revolutionary government favoured small-scale, traditional, or bazaar-related enterprises; as a result, this type of private sector economic activity grew during the 1980s. Not surprisingly, self-employment grew between the 1976 and 1986 population censuses, reflecting growth of the traditional, small-scale, private sector. At the same time, women's industrial employment declined dramatically between the two censuses, falling from 646,000 in 1976 to 216,000 in 1986 - much of it in the textiles, clothing, and leather industries. Much of the job loss is explained by the events during and immediately after the Iranian revolution, when the large privately-owned firms were taken over by workers' councils, or closed down and subsequently nationalized. New recruitment policies favoured men (see Moghadam, 1988).

Women continued to work in the large industrial establishments, but their participation in modern sector industrial activity became almost insignificant. Data in the 1976 census indicate that women earning wages and salaries in public and private sector manufacturing and mining/quarrying accounted for 20-27 per cent of the total. The 40,000 female wage and salary earners in urban factory employment reported in 1983 represented 6 per cent of total employment here. Clearly there had been a sharp decline in female factory employment.

By the mid-1980s there was a further decline in industrial work by women, although the *Statistical Yearbook 1364* [1985-86] showed a decrease in industrial employment for both men and women, indicating the weakness of this sector of the economy. In 1986, the participation of women in the formal industrial sector was still limited, indeed, almost marginal. Manufacturing employed a mere 216,000 women employees, compared with 1.2 million men. Of this number, fully 153,000 (71 per cent) were rural (Tehran, *Statistical Yearbook 1370* [1991], Table 3.8, p. 73), which is indicative of the predominant role played by carpet-weaving in women's 'manufacturing' employment. There are no available data on the

extent to which Iranian women are involved in homeworking and subcontracting.

Where women do work in the more established textiles and garments' factories, they enjoy benefits and services in accordance with labour legislation. For example, the Moghaddam Textile Company in Qazvin employs 235 women (and 795 men), most of them long-time employees. For their children there is a well-staffed and well-equipped nursery and kindergarten, and weekly visits by a doctor. Women workers are entitled to maternity leave and nursing breaks, and the factory provides for six weeks' paid holiday. Nevertheless, many women workers sought early retirement, citing health problems and family obligations. Some complained of varicose veins (from standing), eye strain (from removing imperfections), and back aches (from bending). One group of workers was involved in a grievance procedure to allow them to retire after 20 years' service with 30 days' bonus rather than the 20 days' bonus stipulated by law. They said they had been working since the age of 14 and wanted to return to full-time family life.[1]

Section four: Conclusions and suggestions for further policy-oriented research

There are good reasons why MENA countries should invest in industrial development and in the education and employment of women. Countries where industrialization has been rapid and successful show high participation rates of women in manufacturing employment; sometimes they account for more than half the manufacturing labour force. Research has found a strong relationship between increases in female industrial employment, the growth of manufactured exports, and national economic growth. Blumberg (1989) argues that the historical evidence from Western countries and the more recent evidence from East and South-East Asia strongly suggest that the use and expansion of women's productive capacities is a necessary condition for social and economic progress. At the same time, women's involvement in manufacturing as formally employed workers has been accompanied by an improvement of social, educational and demographic indicators. Countries with the highest female participation ratios in the modern sector (of which manufacturing is usually the 'engine') have the lowest illiteracy rates, the longest life expectancies and the lowest number of children (UNIDO, 1993a).

Can MENA countries expect to develop the competitive, export-oriented female-intensive industries that have been the hallmark of East and South-East Asia? Joffé has suggested that one reason for the low level of foreign investment is that MENA economies are not sufficiently oriented to manufacturing, the preferred sector for direct foreign investment: The major industries which tend to attract direct foreign investment, such as textiles, food processing, light industrial assembly, pharmaceuticals, white consumer

[1] Observations and interviews at Moghaddam Textile Factory, Qazvin, Iran, 17 May 1994.

goods and, in some cases, electronic assembly and plastics, are relatively immature in Middle Eastern economies' (Joffé, 1993, p. 139). A Turkish report states that between 1978 and 1989, the textile sector was one of the lowest in terms of productivity, a function of lack of investments that would raise the level of technology in the sector (DISK-AR, 1992, p. 68). Karshenas (1994) has found similar declines in productivity in Morocco, which suggests that investments are sorely needed in the industrial sector. On the other hand, MENA countries (and others) have faced trade restrictions imposed by the advanced industrialized countries on imports of such products as garments, petrochemicals, iron, and various agricultural products. There is also the problem of competition. According to a *Financial Times* report on Morocco, 'Textiles and clothing, Morocco's biggest industrial sector in value after food and chemicals, is already suffering from competition from South-East Asia and other areas.'[1] This despite Morocco's proximity to the European market and its 'significant advantage in wage costs compared to EU countries - a ratio of as much as one to five...' One problem is that 'many Moroccan companies are too small to take on world competition under the conditions of [the GATT agreement of April 1994]. Three out of four Moroccan manufacturers have fewer than 50 employees.'[1]

At the same time, there is an obvious need to improve the quality of the female labour force in manufacturing. The high level of illiteracy and low level of vocational training and educational attainment of textile and garments' workers raises questions about quality, productivity, and competitiveness. It should be noted that in Vietnam, a female textile or garment worker typically has completed secondary school.[2] A number of studies on the Middle East show a mismatch between the output of the formal education system and the requirements of the economy (Richards and Waterbury, 1990, ch. 5; Pissarides, 1992; Al-Qudsi et al, 1993; Stevenson and Van Adams 1992). Certainly education and training programmes should target women and prepare them for the requirements of modern technological developments. In particular, Morocco, Tunisia and Turkey should endeavour to make their female workers in the export-oriented industries more skilled and competitive.

There is also a need to monitor the expansion of the export sector, for while the new development strategy could raise the demand for female labour, it may not necessarily lead to an improvement of women's employment status in manufacturing, especially at a time of increasing flexibilization of labour markets. Small- and medium-sized enterprises need to be monitored for labour standards. More research is needed on homeworking and subcontracting - how extensive are they, especially in Tunisia, Morocco, and Turkey? Is homeworking the preferred choice of women manufacturing workers or is it a management strategy to lower costs? What is its impact on productivity and quality? Where structural adjustment and labour

1 All quotes from p. 29 of *Financial Times Survey: Morocco*, 27 October 1994.

2 See V.M. Moghadam, 'Market Reforms and Women Workers in Vietnam: A Case Study of Hanoi and Ho Chi Minh City', UNU/WIDER Working Paper No. 116, July 1994.

market flexibility entail lowering of wages, living standards, and labour standards, what have been the effects on the quality and motivation of workers? Why are the numbers of female manufacturing workers fluctuating in countries like Tunisia, Syria, and Morocco? Is the reason one of measurement, or are women losing jobs?

Finally, research in MENA countries is needed on the micro-level consequences for women of education and especially employment. In particular, we need to know more about the impact of women's employment on their status within the family, on household decision-making, on their self-esteem and aspirations, and on their gender and social consciousness. We know about the benefits of education and employment for middle-class and professional women, but what of working-class women? Studies in Latin America and the Caribbean have revealed important differences between women workers and housewives.[1] For Turkey, Ecevit's (1991) study of women factory workers in Bursa showed positive changes in the household as a result of outside employment, while Cinar (1993) notes that homeworkers producing garments for export manufacterers did not regard what they did as 'work'. In this regard, it would be especially interesting to conduct detailed studies in Tunisia and Morocco, where women are strongly represented in manufacturing in general and in the textiles and garments' industries in particular.

---

[1] See Moghadam (1993), Ch. 2 for a review of the literature.

References

Abdel-Latif, Abla M. 1993. 'The Nonprice Determinants of Export Success or Failure: The Egyptian Ready-made Garment Industry, 1975-89.' *World Development* 21 (10): 1677-1684.

Al-Qudsi, Sulayman, Ragui Assaad, and Radwan Shaban. 1993. 'Labor Markets in the Arab Countries: A Survey.' Prepared for the Initiative to Encourage Economic Research in the Middle East and North Africa, First Annual Conference on Development Economics, Cairo (4-6 June).

Birks, J.S., I.J. Seccombe, and C.A. Sinclair. 1988. 'Labor Migration and Labor Organization in the Arab World.' Pp. 718-741 in Michael Adams, ed., *The Middle East*. New York and Oxford: Facts On File.

Catagay, Nilufer, and Gunseli Berik. 1990. 'Transition to Export-Led Growth in Turkey: Is There a Feminization of Employment?' *Review of Radical Political Economics* 22 (1): 115-134.

Chafetz, Janet S. 1990. *Gender Equity: An Integrated Theory of Stability and Change*. Newbury Park, CA: Sage.

Charles, Maria. 1992. 'Cross-National Variation in Occupational Sex Segregation.' *American Sociological Review*, vol. 57, no. 4 (August), pp. 483-502.

Chérif, M'Hamed. 1990. 'Developments in Employment Policies and Labor Market Issues in Tunisia.' Paper prepared for the Senior Policy Seminar on Employment Policy in Arab Countries, Amman, Jordan (25-27 June).

Cinar, E. Mine. 1993. 'Unskilled Urban Migrant Women and Disguised Employment: Homeworking and Women in Istanbul, Turkey.' *World Development*, vol. 22, no. 3, pp. 369-80.

Cinar, E. Mine. 1991. 'Labor Opportunities for Adult Females and Homeworking Women in Istanbul, Turkey.' The G.E. von Grunebaum Center for Near Eastern Studies, University of California, Los Angeles. Working Paper No. 2.

Cinar, E. Mine, Gunar Evcimen, and Mehmet Kaytaz. 1988. 'The Present-Day Status of Small-Scale Industries (Sanatkar) in Bursa, Turkey.' *International Journal of Middle East Studies* 20 (3) (August): 287-301.

Cumings, Bruce. 1988. 'The Northeast Asian Political Economy Under Two Hegemonies.' Pp. 241-62 in Edmund Burke III, ed., *Global Crises and Social Movements: Artisans, Peasants, Populists, and the World Economy*. Boulder, CO: Westview Press.

DISK-AR. 1992. *Turkish Working Class in 1990s*. Istanbul: DISK Institute of Research.

Diwan, Ishac, and Lyn Squire. 1993. 'Economic Development and Cooperation in the Middle East and North Africa.' Discussion Paper Series No. 9 (November). Washington, D.C.: The World Bank.

Ecevit, Yildiz. 1991. 'Shop Floor Control: The Ideological Construction of Turkish Women Factory Workers.' Pp. 56-78 in Nanneke Redclift and M. Thea Sinclair, eds., *Working Women: International Perspectives on Labour and Gender Ideology*. London: Routledge.

Feiler, Gil. 1991. 'Migration and Recession: Arab Labor Mobility in the Middle East, 1982-89.' *Population and Development Review* 17 (1) (March): 134-55.

Fischer, W.B. 1989. 'Iran.' Pp. 416-59 in *The Middle East and North Africa 1990*. London: Europa Publishers (36th ed.).

Gardezi, Hassan N. 1991. 'Asian Workers in the Gulf States of the Middle East.' *Journal of Contemporary Asia* 21 (2): 179-94.

Goldfrank, Walter. 1988. 'Silk and Steel: Italy and Japan Between the Two World Wars.' Pp. 218-40 in Edmund Burke III, ed., *Global Crises and Social Movements: Artisans, Peasants, Populists, and the World Economy*. Boulder, CO: Westview Press.

Hammam, Mona. 1986. 'Capitalist Development, Family Division of Labor, and Migration in the Middle East.' Pp. 158-73 in Eleanor Leacock and Helen Safa, eds., *Women Work: Development and the Division of Labor by Gender*. Massachusetts: Bergin & Garvey Publishers, Inc.

Harris, D.R. 1989. 'Tunisia.' Pp. 820-49 in *The Middle East and North Africa 1990*. London: Europa Publishers (36th ed.).

Hastings, Sue and Martha Coleman. 1992. 'Women Workers and Unions in Europe: An Analysis by Industrial Sector.' Interdepartmental Project Working Paper No. 4 (December). Geneva: ILO.

Hatem, Mervat. 1983. 'Women and Work in the Middle East: The Regional Impact of Migration to the Oil Producing States.' Paper presented to the conference on Women and Work in the Third World, University of California, Berkeley (April).

Henley, John S. and Mohamed M. Ereisha. 1987. 'State Control and the Labor Productivity Crisis: The Egyptian Textile Industry at Work.' *Economic Development and Cultural Change* 35 (3) (April): 491-521.

ILO. 1993a. *Yearbook of International Labour Statistics 1993*. Geneva: ILO.

ILO. 1993b. *International Labour Review*.

Islamic Republic of Iran. 1371 [1992]. *Statistical Yearbook 1370* [1991]. Tehran: Ministry of Planning and Budget, Statistical Center of Iran.

Jemai, Hedi. 1993. 'Women and Development in the Arab World'. Prepared for the Meeting of Senior Officials and Experts, Arab Population Conference, Amman, 4-6 April.

Joekes, Susan. 1987. *Women in the World Economy: An INSTRAW Study*. New York and London: Oxford University Press.

Joekes, Susan. 1985. 'Working for Lipstick? Male and Female Labour in the Clothing Industry in Morocco.' Pp. 183-212 in Haleh Afshar, ed., *Women, Work and Ideology in the Third World*. London: Tavistock.

Joekes, Susan. 1982. 'Female-led Industrialisation and Women's Jobs in Third World Export Manufacturing: The Case of the Moroccan Clothing Industry.' Sussex, England: Institute for Development Studies, University of Sussex.

Joffé, George. 1993. 'Foreign Investment and Economic Liberalization in the Middle East.' Pp. 132-41 in Tim Niblock and Emma Murphy, eds., *Economic and Political Liberalization in the Middle East.* London and New York: British Academic Press.

Karshenas, Massoud. 1994. 'Macroeconomic Policies, Structural Change and Employment in the Middle East and North Africa.' Paper No. 2, prepared under the ILO/UNDP project 'Economic Policy and Employment'. Geneva and New York: ILO and UNDP (May).

Mabro, Robert. 1988. 'Industrialization.' Pp. 687-96 in Michael Adams, ed., *The Middle East.* New York: Facts On File.

Marzouq, Nabil. 1994. 'The Arab States: Workers Facing an Uncertain Future.' *The World of Work*, No. 8, pp. 48-50. Geneva: ILO.

Ministère de l'Artisanat et des Affaires Sociales, Organisation des Nations Unies pour le Developpement Industriel [UNIDO]. 1991. 'Maroc: Mission Exploratoire: Situation de la Femme dans le Secteur Industriel.' Rabat (November-December).

Moghadam, Valentine M. 1995. 'Economic Reform and the Female Labour Force in Egypt.' Mission Report, UNU/WIDER, February.

Moghadam, Valentine M. 1993. *Modernizing Women: Gender and Social Change in the Middle East.* Boulder, CO: Lynne Rienner Publishers.

Moghadam, Valentine M. 1988. 'Women, Work and Ideology in the Islamic Republic.' *International Journal of Middle East Studies* 20 (2) (May): 221-43.

Montoliu, Marisela. 1989. 'Poverty and Labor Markets in Morocco.' Mimeo.

Morsy, Soheir. 1990. 'Rural Women, Work, and Gender Ideology: A Study in Egyptian Political Economic Transformation.' Pp. 87-159 in Seteney Shami, et al., *Women in Arab Society: Work Patterns and Gender Relations in Egypt, Jordan and Sudan.* Providence and Paris: Berg/UNESCO.

Niblock, Tim and Emma Murphy, eds. 1993. *Economic and Political Liberalization in the Middle East.* London and New York: British Academic Press.

Owen, Roger. 1985. 'The Arab Oil Economy. Present Structure and Future Prospects.' Pp. 16-33 in Samih Farsoun, ed., *Arab Society: Continuity and Change.* London: Croom Helm.

Perkins, Frances. 1992. 'Integration of Women's Concerns into Development Planning: Market Interventions.' Pp. 105-204 in ESCAP, *Integration of Women's Concerns into Development Planning in Asia and the Pacific.* New York: UN.

Pissarides, Christopher A. 1992. 'Labor Markets in the Middle East and North Africa.' London School of Economics. Mimeo.

Proirier, Robert A. and Stephen Wright. 1993. 'The Political Economy of Tourism in Tunisia.' *The Journal of Modern African Studies* 31 (1): 149-62.

Richards, Alan and John Waterbury. 1990. *A Political Economy of the Middle East.* Boulder, CO: Westview Press.

Standing, Guy. 1989. 'Global Feminization Through Flexible Labor', *World Development* 17 (7): 1077-1095.

State Institute of Statistics. n.d. *Main Women Indicators Turkey, 1978-1993.* Ankara: State Institute of Statistics, Department of Economic & Statistical Evaluation.

Stevenson, Gail and Avril Van Adams. 1992. 'Youth Unemployment in the Middle East and North Africa: Issues and Policies.' A PHREE paper. Washington DC: The World Bank.

Tilly, Louise and Joan W. Scott. 1978. *Women, Work, and Family.* New York and London: Routledge.

UNCTAD. 1992. *Handbook of International Trade and Development Statistics 1992.* Geneva: United Nations Conference on Trade and Development.

UN/ESCWA. 1993. *Compendium of Social Statistics and Indicators.* Third Issue. NY: United Nations.

UN/ESCWA. 1994a. *Arab Women in ESCWA Member States.* NY: United Nations.

UN/ESCWA. 1994b. 'Executive Summary: Participation of Women in Manufacturing: Patterns, Determinants and Future Trends Regional Analysis, ESCWA Region.' Amman: ESCWA and UNIDO.

UNIDO. 1993a. *Women in Manufacturing: Participation Patterns, Determinants and Trends.* Vienna: United Nations Industrial Development Organization.

UNIDO. 1993b. 'Women in Industry Country Information: Egypt.'

UNIDO. 1993c. 'Women in Industry Country Information: Iran.'

UNIDO. 1993d. 'Women in Industry Country Information: Tunisia.'

UNIDO. 1993e. 'Women in Industry Country Information: Turkey.'

Watson, Helen. 1992. *Women in the City of the Dead.* London: Hurst & Co.

World Bank. 1993. *World Development Report 1993.* Washington, DC: Oxford University Press.

World Bank. 1991. *Trends in Developing Economies 1990.* Washington DC: The World Bank.

Zaalouk, Malak. 1990. *Employment of Women: Conditions of Work.* Preliminary Report SG/1. CAPMAS Labour Information System Project. Cairo: CAPMAS.

Zeytinoglu, Isik Urla. 1988. 'Gender Divisions in Turkey's Labour Market.' Faculty of Business Research and Working Paper Series No. 305. Canada: McMaster University.